



### BEFORE YOU BEGIN, COMPLETE THE FOLLOWING:



**1. Check for duplicates (active MEs for the same individual).** Search the **Monitoring Events Tab** and determine if there is already an active monitoring event (ME) for this individual. If there is, update this active ME appropriately and do not create a new one. **If you have not found an active duplicate, continue to the next step.**



**2. Check for past MEs (inactive MEs for the same individual).** If an inactive ME for this individual already exists, you can visit their person record and click **+New Monitoring Event** (from within the person record's *Monitoring Events* page) to create a pre-populated event in line with the section-by-section guidance below. **If you do not identify an inactive ME, continue to the next step.**



**3. If there is not any ME that matches this person, click +New at the top of the Monitoring Events Tab.**

### Review these key fields when creating a new contact monitoring event:

Fields with \* are required to create your contact monitoring event (ME).

Fields with + are required by the state to track data.

## #1: Record Information

### • Contact or Case Patient\*

#### *Associating Your ME With a Person Record*

If you have not found an ME that matches this individual, leave **Person** blank and **DO NOT** turn on **Create Person?**. CCTO will automatically look for a matching ME upon saving and 1) associate your ME with an existing person record OR 2) create a new person record. *If the system matches an incorrect person record upon saving, [see job aid p.5 for next steps.](#)*

## #2: Basic Info

- First Name\*
- Last Name\*
- Date of Birth<sup>+</sup> (not used for notification, but used in [digital monitoring](#))

The **Priority Case or Contact** toggle allows you to flag a contact who is higher priority to receive a phone call. **Check with your supervisor and your local policies to see if you should be using this toggle.**

Source Case Information

Ongoing Exposure ☐ No

NC-COVID Event ID of Source Patient #1 (Use the number) 101454458

Last Date of Exposure to Source Patient #1 11/18/2020

NC-COVID Event ID of Source Patient #2 (Use the number)

Last Date of Exposure to Source Patient #2

Monitoring End Date 12/2/2020

### #3: Source Case Information

- Ongoing Exposure (if, for example, your contact lives with a case patient)
- NC-COVID Event ID<sup>+</sup> (for the case patient who named this contact)
- Last Date of Exposure<sup>\*</sup> (ACTION: If **Monitoring End Date** is blank, it will auto-calculate for 14 days after the last date of exposure. Update **Monitoring End Date** manually if it needs to be another date.)

Personal Info

Employer Work Company Ltd.

Job Title Part-Time Cashier

Is Student ☒ Yes

School Name School University

### #4: Personal Info

- Employer (if known)
- Is Student (if applicable)
- School Name (if applicable)

Contact Information

U.S. Primary Phone (will be used for text messages) 1-455-454-5454

U.S. Phone #2 1-\_\_-\_\_-\_\_

Country Code ---

Phone #3 ---

Email email@emailtesting.com

Preferred Method of Contact Phone Call

Preferred language English

### #5: Contact Information

- U.S. Primary Phone (this number will be used for [automated text outreach](#) if applicable)
- Email
- Preferred Method of Contact<sup>+</sup>
- Preferred Language<sup>+</sup> (when set to "Text Message" or "Email," a Primary Phone number or Email will become required)

Address

Address Line 1 1000 Hightide Way

Address Line 2 ---

City Shovel

State NC - North Carolina

Postal Code 27949

County Nash


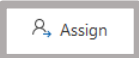
### #6: Address

- Address Line 1 (street address)
- City
- State<sup>\*</sup>
- Postal Code
- County<sup>\*</sup> (use county of case if not known)

Demographic Info	
Gender	+ Female
Race	+ Other
Ethnicity	+ Not Hispanic or Latino
Calculated Age	---
Manual Age (if DOB is not available)	---

## #7: Demographic Information

- Gender+
- Race+
- Ethnicity+
- Manual Age (*if no DOB*)

**Save your work**  to finish. If needed, you can then **use Assign**  at the top of the screen to assign this ME to someone else. Single-click “Me” to input a “User or Team” and assign this contact to them.  
**You’re all done!**

### What’s Next?

- Your contact will be sent an [automated digital exposure notification](#) upon saving as long as you have completed **Last Date of Exposure** as well as **Email and/or US Primary Phone** (*and “Monitoring End Date” is not set to a date before today*).
- **If you are a contact tracer**, check what you need to know about [beginning monitoring](#) and [documenting your outreach](#).